

## **June 24, 2004 FERC/ISO-NE Outreach Meeting at Springfield-Enfield Radisson Hotel**

The FERC/ISO-NE Outreach Meeting was held on May 24, 2004 at the Springfield-Enfield Radisson Hotel in Enfield, Connecticut. Approximately 25 industry participants attended, with Barbara Bourque and Mark Blazejowski from FERC.

A participant briefly discussed Texas's version of EQR reporting and noted that their error log highlights error fields and allows drop down menus to be utilized to choose correct options. The Texas version of the EQR provides a line of information which allows you to go directly to the line where the error exists and tab over to the error and select from pull-down list to correct the error. Barbara noted that FERC's EQR had recently improved the error reporting function to allow the printing of a single page (or range of pages) when the error report is sent to the screen. She asked for input on other possible improvements to the EQR to make filing easier or to improve data quality.

A participant stated that she was having problems when using arrows to enter data manually – not when using tabs.

A participant indicated that when opening csv files in excel, the leading 0 in zip code is dropped and asked if FERC would consider developing a macro in excel to allow users to import data into EQR software. Other filers talked about how they formatted their spreadsheets to avoid that problem.

A question was asked about a generator owned 50/50 by two owners. Do both the generator and the 50/50 owners need to report to FERC? Barbara responded that since the power was being sold under two tariffs by separate companies, each company should report their percentage of the sales.

A discussion of ISO-NE's 90 day resettlements occurred. There was a concern expressed that final data are not available to the utilities from the ISO by the FERC refiling deadline. Essentially, in ISO-NE, Q1 is reported to FERC by participants, then improved data are filed end of Q2. However, not all of Q1 is re-estimated by ISO-NE by the end of Q2. The utilities only have revised data for the first two months of the quarter. When the final data come in for the third month, and if the new adjustment is material, it should be reported yet again to FERC, this time as a Billing Adjustment (rolled up to one line) or at a more granular level. It was noted that it may be easier to report 90-day resettlements to FERC in a detailed form if ISO-NE can generate an easy to use report.

Discussion of ISO-NE's ICAP Market occurred. ISO-NE's ICAP Market is a

monthly market and offers monthly settlement through a supply auction and an efficiency auction at different times throughout the month.

FERC staff noted that there were a lot of problems with data quality, and asked participants if the EQR software should prevent capacity from being sold as MWH or KWH and energy from being sold as MW or KW. There was no objection voiced to adding those constraints. This issue will be discussed at the next full EQR meeting in Washington.

FERC staff was asked to modify the software over time and not roll all changes out all at once. A discussion followed which noted that IT staffs who need to make changes to accommodate new EQR requirements don't generally want to deal with frequent, small changes – they would rather make changes all at once, but less frequently.

A question was raised asking if a QF with no contract and no market based rate authority selling to ISO-NE was required to report to the FERC EQR? Some are selling bilaterally at negotiated rates. FERC staff said that as long as it had no market-based rate tariff, a QF did not have to file an EQR.

A question was asked what happens when a customer company changes names during a quarter and everything else stays the same. The contract with the prior name should be listed as terminated (complete the actual termination date field with the date of the name change) and the new company name should be listed as a separate contract with a contract commencement reflecting the date on the name change.

A question was asked whether payment for black start capability should be included in the EQR. The answer was yes – it is a product name.

**The following notes are from the ISO mapping session held June 25, 2004, and relate to the (attached) draft mapping statement**

Customer charge – paying to ISO and not receiving it therefore not applicable to EQR.

Inadvertent Energy missing from our master list for ISO-NE – just measured at external ties from ISO-NE to other control areas.

Real time ANI = adjusted net interchange – real time – is exactly what you are doing in real time.

Day-ahead ANI = adjusted net interchange – day ahead – is exactly what you are doing in real time.

We will need data behind the settlement statements (daily reports) to get the detail

required for the EQR.

FERC has decided to create a new product name, “Uplift.” It is relevant for ISO-NE, NYISO, PJM, MISO, and also CAISO.

Definition of Uplift – a make whole payment for resources to ensure that payments equal costs for resources called upon by an ISO-RTO.

We need to look at what we did in California with the RMR billing line items to make sure that we do something comparable in ISO-NE.

Request for billing adjustment – hand entered by utility (consistent to EQR) versus automated by ISO-NE (inconsistent to EQR, but easier for utility). The decision was made not to have ISO-NE automatically map this to the EQR for several reasons: 1) the utility would be aware that a billing adjustment might be coming (because the utility has to initiate the dispute process for a billing adjustment to be considered by ISO-NE); 2) the billing adjustment would be measured in different units, depending on what the dispute involved; and 3) it is infrequently seen at ISO-NE (only two instances in the last year or so). Utilities will need to manually enter these as billing adjustments if they are material.

A discussion on the timing for EQR refilings to line up with revised ISO-NE settlement statement issuances occurred. During the discussion, it was noted that the required filing date for the EQR refiling could possibly be modified by FERC to accommodate the ISO schedules.